

# Appendix A

 <p><b>Crawley Borough Council Unmet Demand Survey 2022</b></p> <p>Ian Millership</p> <p>Licensing Committee Crawley Borough Council Tuesday 7<sup>th</sup> February 2023</p>	<p><b>Aim of this survey</b></p> <ul style="list-style-type: none"> <li>Identify any significant unmet demand (or otherwise)</li> <li>Provide committee evidence of current position regarding unmet demand and its significance at this point in time</li> </ul> <p><b>NOTE</b> – survey is focus on HACKNEY CARRIAGE (taxi) demand levels and although the public call private hire vehicles 'taxis' and the level of provision of private hire can impact on hackney carriages, the study is of demand for hackney carriages and if this is unmet or not</p> <ul style="list-style-type: none"> <li>Study of private hire service provision and supply is a much bigger and more complex task</li> <li>All demand surveys are acknowledged as being 'snapshot' views at the time undertaken</li> <li>Survey at 'typical' demand time outside school holiday periods and without any known notable events</li> <li>Was BEFORE major onset of cost of living crisis</li> <li>Some drivers may not have returned from extended holidays</li> </ul>	 <p><b>Study timetable</b></p> <ul style="list-style-type: none"> <li>Undertaken August to December 2022</li> <li>On street surveys November / December</li> <li>Rank observations early September</li> <li>Plate observations on the Saturday night</li> <li>All-driver (including private hire) survey October / November 2022</li> <li>Discussion with hackney carriage trade representative, January 2023</li> <li>WAV user questionnaire issued</li> <li>Key stakeholders during period of survey</li> </ul>
 <p><b>Fleet / Industry issues</b></p> <ul style="list-style-type: none"> <li>123 hcv at time of survey (limited since 2011)</li> <li>661 phv</li> <li>Hackney carriage and private hire drivers both distinct</li> <li>About 160 drivers hold both hackney carriage and private hire driver licences</li> <li>Tradition of 'journeymen' in both fleets</li> <li>Actual numbers of them varies (possibly max 88 hc, 236 phv)</li> <li>Would not amend our conclusions if their views had been given</li> <li>Night life now focussed on High Street Crawley</li> <li>Larger clubs did not survive pandemic</li> <li>National app company strongly active in area since last survey</li> <li>Overall fleet structure strongly traditional with few hackney carriages on private hire circuits, most hcv supplement income from contracts not bookings</li> </ul>	 <p><b>Rank activity</b></p> <ul style="list-style-type: none"> <li>Hours covered shown in Appendix 1 of Report</li> <li>Covers all active hours</li> <li>2022 weekly demand 18% less than 2017</li> <li>2014 to 2017 had seen steady demand levels</li> <li>Strong increase focus on Three Bridges Railway Station rank, now 84% of estimated total hackney carriage rank passengers</li> <li>Haslett Avenue West rank share increased to 7%</li> <li>Boulevard rank usage significantly reduced (shop closure)</li> <li>High Street Jubilee Oak strong reduction (N b. ONLY demand from rank observed)</li> <li>Average passenger levels per hour 29 Thursday, 31 Friday, 41 Saturday</li> <li>But always someone using a rank somewhere in Crawley</li> <li>Reduced level of plates (33% compared to 59% in 2017)</li> <li>Issue of High Street ranks being parked in by private vehicles</li> </ul>	 <p><b>Public consultation</b></p> <ul style="list-style-type: none"> <li>188 people consulted</li> <li>87% had used licensed vehicle in last three months</li> <li>(44% hcv, 32% phv, 11% both)</li> <li>Strong reduction in level those who could not remember when last used hackney carriage (from 82% 2017 to 29% now)</li> <li>This could be transfers from those unable to get private hire</li> <li>Evidence of strong phv competition</li> <li>App company now fourth largest mentioned</li> <li>39% knew of rank at Three Bridges Railway Station, 28% Haslett Avenue West, 24% Crawley Railway Station (?phv office??)</li> <li>People may not be clear on difference between hcv and phv</li> <li>People felt overall licensed vehicle performance 'very good'</li> </ul>
 <p><b>Disability issues</b></p> <ul style="list-style-type: none"> <li>Level of WAV activity at ranks high for vehicles</li> <li>Low actual usage by people in wheel chairs (just one at Haslett Avenue West)</li> <li>22 needed assistance entering vehicles, most at The Boulevard</li> <li>Most night rank service by vehicles appearing to be WAV style</li> <li>Action already being taken to increase level of WAV in bookable private hire fleet</li> <li>Small response to WAV user survey but mainly needed more provision in phv fleet and training</li> </ul>	 <p><b>Trade consultation</b></p> <ul style="list-style-type: none"> <li>All-driver response good</li> <li>79% of response from hackney carriage</li> <li>56% of hackney carriages only got work from ranks</li> <li>31% ranks and school contracts</li> <li>97% (including many private hire) supported retention of limit</li> <li>Strong trade fear of extra plates</li> <li>NO response from hackney carriage journeymen, but a little from private hire journeymen</li> </ul>	 <p><b>Unmet demand evaluation</b></p> <ul style="list-style-type: none"> <li>Despite reduced passenger numbers unmet demand increased</li> <li>Levels not significant in terms of needing MORE extra plates BUT most values increased from 2017 levels</li> <li>Just 9% of observed hours had any passenger waiting</li> <li>Just 4% of all passenger experienced a wait</li> <li>Over all passengers, average passenger delay 0.17 minutes</li> </ul>
 <p><b>Key conclusions</b></p> <ul style="list-style-type: none"> <li>Overall licensed vehicle operations very healthy</li> <li>Good levels of customer satisfaction</li> <li>Hackney carriage and private hire trades very separate</li> <li>Share of total passengers taken by Three Bridges Railway Station further increased despite reduced rail passenger numbers there – now about 20% of passengers leaving station do so in hackney carriages from the rank (was 15% in 2017)</li> <li>Drivers appear to be working about same number of days and hours BUT less active late night and Saturdays</li> <li>(there can be no formal record of actual hours worked)</li> <li>Seems to be hackney carriages more able to get desired income from daytime work, possibly from private hire</li> <li>Unmet demand increased from 2017 but remains a generally low level overall</li> </ul>	 <p><b>Key conclusions (2)</b></p> <ul style="list-style-type: none"> <li>Focus of unmet demand daytime Fridays</li> <li>Crawley Railway Station booking office operation misunderstood by public as a 'rank'</li> <li>Need to improve night safety of passengers by enforcing against private car parking at High Street ranks</li> <li>Appears that hackney carriages have picked up some private hire passengers as their fleet and drivers remained more stable in pandemic (?impact of limit??)</li> <li>Reporting to Council of shortage of 'taxis', increased fares charged and requests for sharing all relate to private hire</li> <li>Little evidence of this appeared in public or stakeholder consultations although there were some references but not as strong as we might expect.</li> </ul>	 <p><b>Thank You.</b></p> <p><b>Any Questions?</b></p>